

# **State of Indiana**

## **IN.gov Branding & Content Management Implementation**

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### **Project Charter**

Final – 2/1/07

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## 1. DOCUMENT INFORMATION

### Document Identification

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### Revision History

DATE	INITIALS	VERSION
01/11/2007	MRB	V0.5
01/19/2007	MRB	V0.6
01/29/2007	CWC	Final

### 1.1 PURPOSE OF THE PROJECT CHARTER

The purpose of the Project Charter is to define the scope, objectives, and overall approach for the project.

### 1.2 IDENTIFICATION OF RELATED DOCUMENTS

- ♦ 2006 State of IN.gov Presentation, Dec. 11, 2006 ([www.IN.gov/iot/directors/IN.gov\\_presentation.ppt](http://www.IN.gov/iot/directors/IN.gov_presentation.ppt))
- ♦ IN.gov Communicators Advisory Council Presentation, Jan. 30, 2007 ([http://www.in.gov/iot/directors/IN.gov\\_Communicators\\_Advisory\\_Council.ppt](http://www.in.gov/iot/directors/IN.gov_Communicators_Advisory_Council.ppt))

### 1.3 DEFINITIONS AND ACRONYMS

The following definitions, acronyms, and abbreviations are found in this document:

Table 1 – Definitions and Acronyms

Term	Definition
AD	Active Directory: repository of State usernames and passwords
CMS	RedDot Content Management System
IN.gov	Refers to the State's website at <a href="http://www.in.gov">www.in.gov</a>
IN.gov Program	The organizational entity that is responsible for IN.gov
LiveServer	RedDot's portal product for CMS
PIO	Public Information Officer
Taxonomy	Hierarchical classification and schema of website content
Internal Customer	State personnel
External Customer	The public (citizens and businesses)

## 2. PROJECT OVERVIEW

### 2.1 BACKGROUND

*The organizing objective of our administration will be higher personal income for Hoosiers, meaning more money, after taxes, in each worker's pocket. Almost every part of state government can do something, or do it faster, or maybe stop doing something, to improve the chances of economic growth in our state. Be prepared to help identify what your area can do, to keep track of it, and to be held accountable for progress or the lack of it.*

*Governor Daniels, 1/10/05*

It is easy to list the positive aspects of IN.gov. The potential for improvement, however, is too great to waste time recounting those here. Today, IN.gov is simply not serving its External or Internal Customers as well as it should.

The External Customer's perception is that IN.gov:

- ◆ Is agency-focused, not *customer*-focused;
- ◆ Is confusing due to lack of consistency;
- ◆ Presents the same types of information differently;
- ◆ Needs a fresher, more customer-friendly design; and,
- ◆ Is often not up-to-date.

Moreover, the Internal Customer's perception is that IN.gov is unable to meet the External Customer's expectations because:

- ◆ State personnel cannot easily and quickly update web content;
- ◆ There is no automated workflow for speedy content review and approval;
- ◆ Minimum standards for publication of web content cannot be enforced today; and,
- ◆ There is no easy way to personalize or drive dynamic content across IN.gov.

These challenges can be overcome with rapid, some might say *radical*, changes to the way the State (and its entities) communicate through IN.gov. With the changes called for by this project, IN.gov will have a new foundation from which it can deliver to its mission and rise to the command of the Governor—to move faster and deliver higher quality information and services through a less expensive delivery model.

### 2.2 PROJECT DESCRIPTION

To overcome the aforementioned challenges facing IN.gov, the State will, through this project, (1) establish an IN.gov brand and design standards and (2) implement a content management system to make it easy to update IN.gov and easy to ensure compliance with those standards.

To say it once, this is no simple undertaking. More than 70 agencies and their more than 300,000 pages will be affected. Current processes for changing content, which differ across the agencies, will be changed and standardized. The way that Internal Customers think about their agencies' websites will fundamentally change. But, the potential for an easier to use and easier to update IN.gov is within reach and must be realized.

In preparation for this project, a multi-agency team worked through summer and fall 2006 to select the RedDot CMS, a content and portal management software package. With the CMS selected and procured, appropriate executive support was secured to ensure success.

In the coming months, the CMS will be technically ready and the brand standards will be established. The “top-level” IN.gov pages and a pilot agency will be migrated to the new design. Thereafter, agency websites will be migrated in stages over the next year and half.

The critical activities of this project are grouped into the following concurrent sections:

- ◆ Implementation Approach defines the scope of the implementation effort in terms of how the CMS will become an enterprise solution. It addresses the high-level plan for implementing the CMS technical components and for migrating agency websites into the CMS. The activities and deliverables will define the overall goals and scope for the entire initiative. In addition, they will define the parameters of a phased implementation that will be organized and orchestrated over many months.
- ◆ Information Architecture (IA) is about designing and organizing content presented within IN.gov. IA develops the foundation for ease-of-use and defines the framework for the user experience. IN.gov brand and design standards will be established as part of this effort. Additional activities encompass usability analysis, requirements definition, taxonomy definition, and a prototype. The successful completion of this phase will establish the framework for IN.gov.
- ◆ Business Process Analysis addresses the design of standard content management processes by which agencies will create, edit, publish, delete, and archive content using the CMS. These processes will be in accordance with the standards for publication of content and will adhere to workflow guidelines. The standard content management processes will be translated into step-by-step procedures for automation wherever possible. These procedures will be published to all agencies and will be used as the basis for CMS training during agency migrations. Business Process Analysis is dependant upon the completion of Governance activities that define the rules and guidelines for publishing content.
- ◆ Implementation addresses how the CMS will be implemented. Implementation is dependant upon (1) the overall scope and approach that is defined as part of the Implementation Approach activities and (2) the completion of Governance deliverables to provide parameters for configuring the CMS. The Implementation activities are based upon a phased approach. The first phase creates the technical foundation by establishing a running CMS and then by completing a pilot migration into the CMS. Upon completion of the pilot, agency websites will follow a standard migration process. The implementation encompasses technologies, technical standards, and architecture. It includes requirements definition, installation, IN.gov enhancement, customization, publishing, testing, migration, and support of the CMS.
- ◆ Organizational Change Management (OCM) is a planned approach to implementing change that will occur as a result of the project. The goals are to maximize the benefit of the change and minimize the risk of failure of implementing the change. OCM deals primarily with the human aspect of change by addressing user involvement, staffing, communication, and risk mitigation. During the OCM planning timeframe, the Stakeholder Involvement, Staffing, Communication, and Business Transition Plans will be created. Subsequently, these plans will be executed throughout the agency migration timeframe. OCM is dependant upon the completion of Implementation Approach deliverables that define the scope, parameters, and rollout plan for the entire implementation effort.

- ◆ Program Management addresses leading, managing, and coordinating all of the detailed activities related to the implementation of the CMS. Program Management will occur throughout the entire implementation effort and will continually measure actual performance against planned performance. Status meetings will be conducted, issues resolved, risks mitigated, and scope changes addressed.

## 2.3 MILESTONES

MILESTONE	COMPLETION DATE
Announcement of Project to Agency Directors, PIOs, & Webmasters	December 11, 2006
Scope, Goals, & Objectives Finalized	December 20, 2006
Project Plan Finalized	January 25, 2007
Implementation Approach Finalized	January 25, 2007
CMS Environment Established	February 14, 2007
IN.gov Brand & Design Finalized	March 9, 2007
Guidelines for Publishing IN.gov Content Finalized	March 23, 2007
IN.gov Top-level & Pilot Agency Migrated	April 11, 2007
Agency Migration Plan Finalized	April 11, 2007
INDOT Migration Begins (First Agency)	April 16, 2007
Agency Phased Migration Begins with Group 1	May 1, 2007
IN.gov Brand & Design Reviewed by Focus Group	Q4 2007 or After
Migration Plan (Remainder) Completed	TBD
All Executive Branch Agencies Migrated to CMS	June 30, 2008

## 2.4 RELATED INITIATIVES

- ◆ The web analytics solution WebTrends will be implemented with the CMS.
- ◆ help.IN.gov FAQs will be implemented across the CMS.
- ◆ Non-web forms (*e.g.*, .PDF, .doc, and .xls), will be centralized by ICPR.

### 3. PROJECT SCOPE

#### 3.1 GOALS AND OBJECTIVES

The following are the project goals and supporting objectives for the IN.gov Branding & Content Management Implementation project.

	GOALS	OBJECTIVES
1	<i>For the External Customer</i> , provide state government information in a customer-centric manner.	<ul style="list-style-type: none"><li>◆ Establish a consistent IN.gov brand. across IN.gov</li><li>◆ Provide automated workflow to track the timeliness of content posting and provide mechanism to ensure compliance with IN.gov branding standards.</li><li>◆ Provide adequate training to all content creators and approvers.</li><li>◆ Establish and maintain a stable and secure CMS environment.</li></ul>
2	<i>For the Internal Customer</i> , make it easier for users in the state government to update content on IN.gov.	

#### 3.2 DELIVERABLE SCOPE

This section identifies the project deliverables by Phase that support achieving the project objectives:

	PROJECT PHASE	DELIVERABLE
1.0	Planning	<ul style="list-style-type: none"><li>• Agency Matrix</li><li>• Implementation Charter</li><li>• Baseline Plan</li></ul>
2.0	Design & Configuration	<ul style="list-style-type: none"><li>• Website Design Concepts</li><li>• Approved Web Design</li><li>• XHTML Re-design Website Prototype</li><li>• Website Requirements Specifications</li><li>• Taxonomy Standards</li><li>• Technical Requirements</li><li>• Technical Specifications</li><li>• CMS Pilot Production Environment</li><li>• LiveServer Pilot Production Environment</li><li>• Network and Process Documentation Revisions</li><li>• Governance</li><li>• Content Publishing Rules &amp; Guidelines</li><li>• CMS Guidelines and Requirements</li><li>• LiveServer Guidelines and Requirements</li><li>• Information Architecture Standards</li><li>• CMS/LiveServer Support &amp; Maintenance Guidelines</li></ul>

	PROJECT PHASE	DELIVERABLE
3.0	Implementation	<p>RedDot Training</p> <ul style="list-style-type: none"> <li>• CMS Trained Developers and System Admins</li> <li>• LiveServer Trained Developers and System Admins</li> </ul> <p>IN.gov Migration Pilot with Pilot Agency</p> <ul style="list-style-type: none"> <li>• Pilot Migration Scope and Approach document</li> <li>• Pilot CMS LiveServer Requirements</li> <li>• Documented Current Pilot Group Content Management Processes</li> <li>• Documented New Content Management Processes</li> <li>• Content Management Process Training</li> <li>• CMS Main Structural Navigation Template</li> <li>• CMS IN.gov Content Templates</li> <li>• CMS-Configured Taxonomy</li> <li>• IN.gov Content Inventory and Assessment</li> <li>• Pilot Agency Content Inventory and Assessment</li> <li>• Test Scripts</li> <li>• Test Environment</li> <li>• IN.gov Test Website</li> <li>• Populated IN.gov Test Website</li> <li>• Pilot Agency Test Website</li> <li>• Populated Pilot Agency Test Website</li> <li>• Pilot User Acceptance Sign-off</li> <li>• Redesigned CMS Managed IN.gov Website</li> <li>• Redesigned CMS Managed Pilot Agency Website</li> </ul> <p>Agency(1+N) Migrations</p> <ul style="list-style-type: none"> <li>• Content Inventory and Assessment</li> <li>• Content Management Process Transformation Assessment</li> <li>• Content Management Process Transition Plan</li> <li>• Test Website</li> <li>• Content Management Process Training</li> <li>• Content Mapped and Populated to Agencies' Test Websites</li> <li>• Pilot User Acceptance Sign-off</li> <li>• CMS Managed Agency Websites</li> </ul>
4.0	Organizational Change Management (OCM)	<ul style="list-style-type: none"> <li>• Stakeholder Involvement Plan</li> <li>• Staffing Plan</li> <li>• Communication Matrix</li> <li>• Business Process Transition Plan</li> </ul>
5.0	Program Management	<ul style="list-style-type: none"> <li>• CMS Post Production Support Plan</li> <li>• Status Meetings &amp; Reports</li> <li>• Issue Logs &amp; Change Requests</li> <li>• Project Status Report Form</li> <li>• Team Member Status Report Form</li> <li>• Migration Iteration Scope Form</li> <li>• Project Information Website</li> </ul>

### **3.3 OUT OF SCOPE**

The following are beyond the scope of this project, but will be addressed during later efforts:

- Citizen authentication into IN.gov via LiveServer.
- Integrated applications via LiveServer.

### **3.4 ORGANIZATIONAL SCOPE**

This initiative will impact agency users who author and maintain IN.gov content as well as any citizens or businesses that interact with the State through IN.gov.

To ensure that processes are tested, reliable, and ready for use by these entities, conversations with Separately Elected Offices, the Legislative Branch, and the Judicial Branch regarding the potential of leveraging the CMS will begin after the implementation for the Executive Branch is well underway.

### **3.5 TEMPORAL SCOPE**

Nothing at this time should prevent complete migration of the Executive Branch agencies by June 30, 2008.

### **3.6 FINANCIAL SCOPE**

If the standard processes defined are followed, the implementation of the CMS will come at no fiscal cost to the agencies. The cost of standard implementation of content licenses for content creators, training, hardware, etc. will be funded by the IN.gov program.

## 4. PROJECT ORGANIZATION

### 4.1 EXECUTIVES

EXECUTIVES	PROJECT ROLE
Betsy Burdick	Executive Sponsor
Stephanie Genrich	Project Sponsor
Chris Cotterill	Project Manager

### 4.2 LEADERSHIP TEAM

This team ensures that the IN.gov staff has a sound plan for implementing the redesign, ensures that IN.gov staff set reasonably aggressive deadlines and meets them, and provides Executive Level advice and support to the Director of IN.gov over the course of this project.

MEMBER	AGENCY
Stephanie Genrich, Chairperson	Governor's Office
Christy Denault	Lt. Governor's Office
Jim Corridan	ICPR
Michael Huber	GEFP
Ryan Kitchell	IFA
Chris Ruhl	OMB
Maureen Weber	BMV

### 4.3 REDESIGN TASK FORCE

This team reviews, critiques, improves, and ultimately approves the proposed redesigns for IN.gov web pages. This team establishes the initial balance between the State/customer consistency need and the agencies' needs.

MEMBER	AGENCY
Stephanie Genrich, Chairperson	Governor's Office
Gary Abell	INDOT
Deb Abbott	ISDA
Kim Brant	DNR
Greg Cook	BMV
Stephanie McFarland	DOR
Linda McGrannahan	IEDC
Dennis Rosebrough	FSSA

#### 4.4 WEBMASTER ADVISORY TASK FORCE

This team provides direct, regular, advice to the Director of IN.gov from the perspective of webmasters.

MEMBER	AGENCY
Robert Paglia	IN.gov Program
Mark Amick	IDEM
Vicki Chinn	FSSA
Kevin Jones	DOC
Timothy Lloyd	DWD
Robert St. John	ISDH

#### 4.5 IMPLEMENTATION TEAM MEMBERS

TEAM MEMBER	TEAM ROLE
Chris Cotterill	Project Manager
Mehgan Sabau	Communication Manager
Robert Paglia	Migration Project Manager
Mary Blankemeier	Implementation Project Manager; Sr. Business Analyst
Joe Corey	Technical Implementation Project Manager; Security Architect; Governance Analyst
Dave Daniel	Implementation Technical Lead
Ron Carver	System Administrator 1
Greg Swallow	System Administrator 2
James Rupley	Design Lead
Joe Coram	Information Architect; Taxonomy Analyst
Ben Roe	Graphics Designer
TBD	Web Developer
TBD	Application Developer
Roger Eason	RedDot Sponsor
John Slocum	RedDot Project Manager; RedDot Technical Expert
TBD	RedDot CMS Product Specialist
TBD	RedDot LiveServer Product Specialist
Contracted	Organizational Change Management Analyst
Bruce Biddle	Migration Analyst, Testing Coordinator
TBD per Agency	Agency Migration Contact

## 4.6 ROLE DESCRIPTIONS

PROJECT ROLE	RESPONSIBILITIES
Executive Sponsor	<ul style="list-style-type: none"> <li>• Has ultimate authority over the project</li> <li>• Approves major decisions when requested to do so by Project Sponsor or Project Manager</li> <li>• Makes final decisions on project matters affecting policy</li> <li>• Communicates the existence and scope of the project to the Executive Level</li> </ul>
Project Sponsor	<ul style="list-style-type: none"> <li>• Assists with resolving project issues (when needed)</li> <li>• Provides leadership to the team – sets vision, identifies objectives and deliverables</li> <li>• Ensures the Executive Sponsor is briefed on the project status</li> <li>• Supports the Project Charter and Project Plans</li> <li>• Approves Project Change Requests when requested by the IN.gov Project Manager</li> </ul>
Project Manager	<ul style="list-style-type: none"> <li>• Participates in Leadership Team</li> <li>• Responsible for the project and outcomes</li> <li>• Supports the Project Charter and Project Plans</li> <li>• Provides leadership to the team – sets vision, identifies objectives and deliverables</li> <li>• Controls the business aspects of the project</li> <li>• Approves deliverables</li> <li>• Communicates the existence and scope of the project to the IT Area</li> <li>• Assists with resolving project issues (when needed)</li> <li>• Helps manage scope changes</li> <li>• Ensures business and IT resources are kept current on project scope and project status</li> <li>• Ensures all functional business and IT requirements are addressed</li> <li>• Helps remove any obstacles to successful project completion</li> <li>• Coordinates IT department's participation in the testing, training, and implementation of the CMS</li> <li>• Provides IT staff resources designated on the Project Team or Project Support Team</li> </ul>

Implementation Project Manager	<ul style="list-style-type: none"> <li>• Assists with creation of implementation approach deliverables</li> <li>• Leads, manages, and coordinates all of the detailed activities related to branding IN.gov, and the CMS Implementation for agencies</li> <li>• Manages expectations</li> <li>• Manages scope changes</li> <li>• Determines roles and responsibilities for Team members</li> <li>• Works with Implementation Project Team to develop estimates for effort and duration to achieve tasks, define task interdependencies and analyzes critical path, develops project schedule, assigns resources to tasks, and performs resource loading and leveling</li> <li>• Creates and maintains Project Plan</li> <li>• Manages day-to-day activities of the project</li> <li>• Executes formal reviews</li> <li>• Ensures deliverables are completed and satisfy expectations</li> <li>• Tracks and disposes of issues</li> <li>• Provides Project Status Reports</li> <li>• Identifies, quantifies and closes Change Requests</li> </ul>
Technical Implementation Project Manager	<ul style="list-style-type: none"> <li>• Oversees technical activities and assists with the creation of the implementation deliverables</li> <li>• Responsible for all technical aspects of the CMS implementation, ensuring that the solution gets constructed according to Requirements Specification and Design documents</li> <li>• Ensures the appropriate developers are working on project tasks that match their skill set</li> <li>• Provides status of tasks started and completed to the Implementation Project Manager</li> <li>• Assists the Implementation Project Manager in re-forecasting remaining work on open tasks</li> <li>• Assists with system testing</li> <li>• Determines necessary technical documentation needed to support solution</li> <li>• Ensures all technical documentation that is within the scope of the project is completed</li> </ul>
Implementation Technical Lead	<ul style="list-style-type: none"> <li>• Monitors daily progress of IN.gov developers on the Project Team</li> <li>• Continuously ensures the appropriate developers are working on project tasks that match their skill set</li> <li>• Provides status of tasks started and completed to the Implementation Project Manager</li> <li>• Assists the Implementation Project Manager in re-forecasting remaining work on open tasks</li> <li>• Completes construction of and unit testing on more complex and critical components of the overall solution</li> <li>• Ensures all developers perform unit testing on their assigned tasks</li> <li>• Assists with system testing</li> </ul>

Security Architect	<ul style="list-style-type: none"> <li>• Responsible for integration of the State's Active Directory with IN.gov</li> <li>• Secures communication with the State's AD</li> <li>• Secures the IN.gov environment, including application and network security</li> <li>• Ensures that all State policies and procedures regarding data security are upheld</li> </ul>
Migration Project Manager	<ul style="list-style-type: none"> <li>• Managing activities related to the IN.gov and agency migration plan.</li> <li>• Coordinates migration project activities (e.g. status reporting, requirements gathering, and collaboration between entities and IN.gov).</li> <li>• Coordinates training in new business processes</li> <li>• Coordinates business areas' participation in the testing, training, and implementation of the solution</li> </ul>
System Administrator	<ul style="list-style-type: none"> <li>• Establishes the environment for the entire CMS infrastructure (DEV, QA, PROD)</li> <li>• Ensures configuration of firewall, DNS</li> <li>• Establishes network topology segmentation</li> <li>• Works with IOT on any network related activities</li> <li>• Maintains users, connectors, and cluster settings for the database and configuration of the RedDot Suite</li> <li>• On-going role of Server Manager after deployment</li> </ul>
Design Lead	<ul style="list-style-type: none"> <li>• Responsible for all branding and design activities</li> <li>• Monitors all work related to branding and design</li> <li>• Oversees the development of a prototype and CMS Templates</li> <li>• Develops usable artifacts such as CSS and XHTML from mock-ups</li> <li>• Defines and creates structural and content templates</li> </ul>
Web Developer	<ul style="list-style-type: none"> <li>• Develops usable artifacts such as CSS and XHTML from mock-ups</li> <li>• Defines and creates structural and content templates with assistance from RedDot Specialists</li> </ul>
Graphics Designer	<ul style="list-style-type: none"> <li>• Responsible for the creation of mock-ups and style guide for IN.gov and agencies</li> <li>• Responsible for website design</li> </ul>
Information Architect	<ul style="list-style-type: none"> <li>• Oversees the completion of all Information Architecture deliverables</li> </ul>
Taxonomy Analyst	<ul style="list-style-type: none"> <li>• Determines usability of existing taxonomy</li> <li>• Defines new taxonomy for IN.gov and agencies</li> </ul>
Governance Analyst	<ul style="list-style-type: none"> <li>• Leads business requirements gathering activities for CMS Governance</li> <li>• Gathers and documents detailed business and technical requirements via interviews, meetings, or facilitated sessions with business and IT representatives</li> <li>• Documents CMS Governance deliverables</li> </ul>
Migration Analyst	<ul style="list-style-type: none"> <li>• Leads business requirements gathering activities for Business Processes</li> <li>• Gathers and documents detailed business and technical requirements via interviews, meetings, or facilitated sessions with business and IT representatives</li> <li>• Responsible for documenting business process deliverables.</li> <li>• Facilitate workshops among Webmasters, Governance Resources, and RedDot Consultants</li> <li>• Assists Project Team in identifying need for new business processes and facilitates changes in existing business processes</li> </ul>

Organizational Change Management Analyst	<ul style="list-style-type: none"> <li>• Leads business requirements gathering activities for OCM</li> <li>• Gathers and documents detailed business and technical requirements via interviews, meetings, or facilitated sessions with business and IT representatives</li> <li>• Provides expertise in organizational change management</li> <li>• Provides Best Practices approaches</li> <li>• Participates in the completion of all of organizational change management deliverables</li> </ul>
Communication Manager	<ul style="list-style-type: none"> <li>• Coordinates with the OCM Analyst to communicate changes</li> <li>• Communicates project updates to the stakeholders</li> <li>• Maintains project website</li> <li>• Reviews and approves all public facing communication and documentation for the project</li> </ul>
RedDot Project Manager	<ul style="list-style-type: none"> <li>• Leads RedDot Development team</li> <li>• Tracks and monitors RedDot development activity and reports to the Project Manager</li> </ul>
RedDot CMS Product Specialist	<ul style="list-style-type: none"> <li>• Subject Matter Expert in all technical aspects of RedDot CMS</li> <li>• Performs installation, configuration, and development work related to CMS</li> <li>• Ensures taxonomy can be configured in RedDot CMS</li> </ul>
RedDot LiveServer Product Specialist	<ul style="list-style-type: none"> <li>• Subject Matter Expert in all technical aspects of RedDot LiveServer.</li> <li>• Performs installation, configuration, and development work related to LiveServer</li> </ul>
Developer	<ul style="list-style-type: none"> <li>• Constructs solution according to Requirements Specification, Design documents, and task estimates</li> <li>• Performs unit testing</li> <li>• Tracks time spent on assigned tasks and assesses estimates to complete all started tasks</li> <li>• Reports status of activities to Implementation Project Manager</li> </ul>
Agency Migration Contact	<ul style="list-style-type: none"> <li>• Provides requirement information to the Business Analyst during requirements gathering for their migration</li> <li>• Validates project deliverables as requested for their respective Business Areas</li> <li>• Depending upon role and subject area expertise, may be a member of the test team that participates in the execution of test cases</li> <li>• Participates in Client Acceptance Testing</li> </ul>
Testing Coordinator	<ul style="list-style-type: none"> <li>• Writes test scripts and test cases</li> <li>• Verifies all requirements are cross-referenced to test cases</li> <li>• Coordinates System and Quality Assurance (QA) testing</li> <li>• Assists Test team with executing the test plan and test cases during system testing</li> </ul>

## 5. PROJECT APPROACH

### 5.1 PERFORMANCE MANAGEMENT AND STATUS REPORTING

Performance management is essential to the execution of the project. The objective is to verify, manage, and communicate project performance, productivity, and the status of variances. This will ensure that all project actions are consistent with integrated change, scope, cost, schedule, and quality control and project priorities and objectives.

The Project Manager will conduct weekly Team Status Meetings, which will be scheduled at the Kick-Off Meeting, to review status of tasks and any issues that may arise. Each Implementation Team member is required to provide the Implementation Project Manager with a Team Member Status Report every Tuesday by 4 p.m. This will provide input to the Weekly Project Status Report and Project Plan update and forecast. Team members will report on tasks that were started and completed in the previous week and tasks that are planned to start and finish in the coming week. A Status Report template will be provided to each member. The team members should also report any known issues or updates to risk triggers, as well as potential change requests.

The Project Manager will provide regular Status Reports to the Sponsors and the teams. The Status Report will consist of: project accomplishments, milestone status, upcoming activities, report of actual costs to budget, report of actual effort to budget, report of actual task progress (started and completed) to plan, report of schedule variances, action items, issue summary, and a change summary. The Project Manager will also provide the teams with the re-forecasted Project Plan and schedule based on status input received that week as well as an updated Risk Log communicating the status of risks identified for the project.

Status Reports will be provided weekly to the client. The Status Reports will consist of:

- ◆ Project accomplishments
- ◆ Upcoming activities
- ◆ Report of task progress
- ◆ Report of schedule variances
- ◆ Issue summary
- ◆ Change Request summary
- ◆ Action Items

### 5.2 COMMUNICATION MATRIX

Project communication occurs in various forms and frequencies throughout the project. Following is a matrix identifying the various types of information that will be communicated during the project along with who initiates it, who receives it, why it is communicated, how often it is distributed, and by what mechanism.

INFORMATION TYPE	INITIATOR	RECEIVER	FREQUENCY	METHOD	PURPOSE
General Project Questions	Various	IN.gov Project Manager (PM)  Implementation Project Manager (PM )	As needed	<ul style="list-style-type: none"> <li>E-mails</li> <li>Telephone</li> <li>Meetings</li> </ul>	<ul style="list-style-type: none"> <li>Verifies questions about project schedule, milestones, goals, objectives, etc</li> <li>Determines current status of open issues</li> <li>Determines current status of change requests</li> </ul>
General Scope Questions	Various	Business Analyst(s)	As needed	<ul style="list-style-type: none"> <li>E-mails</li> <li>Telephone</li> <li>Meetings</li> </ul>	<ul style="list-style-type: none"> <li>Verifies questions about project scope – what's in scope, what's out of scope</li> <li>Clarifies of a how a feature will work</li> </ul>
Initial Change Requests	Team Members	Implementation PM	As needed	<ul style="list-style-type: none"> <li>Meetings</li> <li>E-mails</li> <li>Change Request form delivered to Project Manager</li> </ul>	<ul style="list-style-type: none"> <li>Provides high-level overview of the change</li> <li>Indicates who is requesting the change</li> <li>Indicates why the change is being requested</li> </ul>
Quantified Change Requests (requiring approval)	Implementation PM	IN.gov PM, Project Sponsors	As needed	<ul style="list-style-type: none"> <li>Meetings</li> <li>Completed Change Request delivered to Project Sponsor</li> </ul>	<ul style="list-style-type: none"> <li>Specifically states the change</li> <li>Identifies the effort and time required to complete the change</li> <li>Ensures everyone is on the same page with changes that are approved and rejected</li> </ul>
Issues	Various	Implementation PM	As needed	<ul style="list-style-type: none"> <li>Meetings</li> <li>E-mails</li> <li>Issue detail form delivered to Implementation PM</li> </ul>	<ul style="list-style-type: none"> <li>Provides high-level over of the issue at hand</li> <li>Suggests resolutions</li> <li>Indicates the significance of the impact of the issue</li> </ul>
Significant Issues	Implementation PM	IN.gov PM, Project Sponsor, Team Leads	As needed	<ul style="list-style-type: none"> <li>Meetings</li> <li>Issue detail form delivered to IN.gov PM and Team Leads</li> </ul>	<ul style="list-style-type: none"> <li>Specifically states the issue at hand</li> <li>Discusses the plan to resolve the issue</li> <li>Lists the actual resolution on closed issues</li> <li>Ensures everyone is on the same page with issues that are open and resolved</li> </ul>
Team Member Status	Team Member	Implementation PM	Weekly by Tuesday at 5:00 PM	<ul style="list-style-type: none"> <li>Team Member Status Report Form completed and emailed to PM</li> </ul>	<ul style="list-style-type: none"> <li>Provides update to work plan with actuals</li> <li>Reports on progress, problems, and plans</li> <li>Manages risks, issues and scope</li> </ul>
Project Status Updates	Implementation PM	Project Sponsor IN.gov PM	Weekly	<ul style="list-style-type: none"> <li>Sponsor Meetings</li> <li>Status Report e-mailed to Project Sponsor</li> </ul>	<ul style="list-style-type: none"> <li>Provides updated information</li> <li>Manages Risks, issues and scope</li> <li>Assesses resource needs</li> <li>Assesses budget status</li> <li>Assesses schedule status</li> </ul>
Project Team Communication	Implementation PM	Project Team members	Weekly or as issues warrant	<ul style="list-style-type: none"> <li>Meetings of all Project Team members</li> <li>E-mail</li> <li>Electronic Folders</li> </ul>	<ul style="list-style-type: none"> <li>Communicates information of interest to all Project Team members</li> <li>Foster team coordination and cohesiveness</li> <li>Manage risks, issues and scope</li> </ul>
Project Mentoring	Implementation PM	Support Team Leads and/or Project Team members	Scheduled as needed	<ul style="list-style-type: none"> <li>Meetings</li> <li>E-mails</li> <li>Telephone and video conference</li> </ul>	<ul style="list-style-type: none"> <li>Discusses concerns, issues, changes specific to each project or support team</li> <li>Ensures understanding and use of established processes and standards</li> </ul>

### **5.3 CHANGE MANAGEMENT**

Scope changes will be presented to the Project Sponsor in writing using a standard Change Request form. The Project Manager will review all change requests with the Technical Lead to determine the need for a technical investigation.

For all Change Requests that require a technical investigation, a technical resource will conduct the investigation to determine cost, schedule, and implementation approach. The results of the investigation will then be presented to the Project Manager for approval.

For all Change Requests that do not require a technical investigation, the Technical Lead and the Implementation Project Manager will assess the cost, scheduled and implementation approach and present the Change Request to the Project Manager for approval.

All approved changes will be implemented during the current project. A Change Request Summary will be included with every weekly Status Report.

### **5.4 ISSUE MANAGEMENT**

The Project Manager will manage all project issues. The Project Manager is responsible for any necessary action planning required to accommodate the issue and will assign the appropriate resource(s) to resolve the issue.

The Implementation Project Manager will document the issue on a standard Issue Detail Form and will communicate the details of the issue and the action plan to the Project Manager. An Issue Summary will be included with every weekly Status Report.

### **5.5 RISK MANAGEMENT**

The purpose of the risk management strategy is to facilitate centralized communication between all identified project audiences, as they identify and document known project risks, rate each risk, and provide a mitigation plan to execute in the event a risk occurs.

There are four steps to the Risk Management Process:

- ◆ Risk Identification
- ◆ Quantitative Risk Analysis
- ◆ Risk Response Planning
- ◆ Risk Monitoring and Control

During the initial Program planning, the Project Manager will conduct a risk assessment with the combined Project Team to identify, categorize, and document known risks to the project in a Risk Identification List. The team will assess the impact and likelihood of the identified risks, analyze the probability of each risk, and evaluate the consequences on the project objectives. Probable causes or “triggers” for each risk should be identified to assist with risk response planning.

Once the risks are assessed, the team will determine a risk response plan for each risk (acceptance, avoidance, transference, or mitigation) by developing options and determining actions to enhance opportunities and reduce threats to the project objectives.

The Implementation Project Manager will track “current” risks in a separate risk log. At the discretion of the Implementation Project Manager, risks specified in the Risk Identification List will be transferred to the Risk Log for monitoring once the specified threshold has been reached. The Implementation Project Manager will update and submit the Risk Log with the Status Report. Any risk item that carries significant or maximum impact to the project and/or the business will be communicated to the Project Sponsor and Executive Sponsor.

If the occurrence of a risk event on the Risk Log appears imminent, the risk will be transferred to the Issue Log for monitoring and resolution, including any risk response strategy noted in the Risk Response Plan for that risk. The change budget noted may be used to respond to realized risks that have become issues or to execute the mitigation plan for the risk.

In addition, the full complement of risks identified at the time the project was initiated should be re-evaluated on a pre-determined interval to assess if a risk should be added to the Risk Mitigation Plan. In addition, if scope is changed, it is possible the Risk Mitigation Plan will need to be updated accordingly.

## **5.6 QUALITY MANAGEMENT**

The quality of the decisions will be ensured through the following mechanisms:

- ◆ The team will only implement changes that are authorized by the Project Manager.
- ◆ The Project Manager will review all deliverables and secure acceptance by Redesign Task Force and Leadership Executive Team.
- ◆ All technical work products will undergo a technical quality review with Technical Lead.
- ◆ The project plan will be “baselined” upon approval of this Charter and Work Plan. Subsequent Status Reports will be made relative to the baseline. The project baseline can only be changed via an approved Change Request.
- ◆ Solution reviews will be conducted with the Project Manager during the construction phase to ensure the Project Manager’s satisfaction.

## **5.7 ACCEPTANCE CRITERIA**

The following items will determine acceptance for project closure:

- ◆ Project Manager acceptance of all deliverables
- ◆ Signature approval on the Project Closure Criteria Checklist
- ◆ Implementation of all approved requirements
- ◆ Implementation of all approved changes
- ◆ Resolution of all project issues
- ◆ Attendance at the Project Closure Meeting